



## 2024 Course Catalog (*Edition 4.5.1*)

### TUESDAY, April 9<sup>th</sup>

2:00pm-5:00pm	<b>Executive Committee Meeting</b>	<i>McIntosh</i>
3:30pm-7:00pm	<b>WASFAA 2024 Conference Planning Committee Meets</b>	<i>Mahler Boardroom</i>

### WEDNESDAY, April 10<sup>th</sup>

8:00am-3:00pm	<b>Registration Open</b>	<i>Foyer</i>
8:30am-10:45am	<b>Exhibitor Move-In</b>	<i>Salon B</i>
8:30am-11:00am	<p><b>Pre-Conference Session</b>  <b><u>NASFAA Credential – Campus Based Programs</u></b>  <i>Presenters: Kimberly Pick, Financial Aid Coordinator, Chippewa Valley Technical College</i>  <i>Heidi Johnson, Assistant Director of Scholarships and Financial Aid, University of Wisconsin Law School</i>            This session will review the differences among the campus-based Title IV programs, which is the term commonly applied to certain federal financial aid programs administered directly by schools. You will learn the provisions common to the campus-based programs, as well as the program-specific requirements for each program. This will help you demonstrate the ability to administer these Title IV aid programs appropriately and effectively. Additionally, this session will prepare you to take the NASFAA credential test. The range of topics in the credential test include Campus-Based Common Provisions, the Federal Supplemental Educational Opportunity Grant Program, Federal Work-Study, and the Federal Perkins Loan Program.</p>	<i>Pippin</i>
11:00am-4:15pm	<b>Exhibitor Area Open</b>	<i>Salon B</i>
11:15am-11:45am	<p><b><u>Conference Welcome</u></b>  <i>Reserved seating in front of room for WASFAA Executive Board &amp; First Time Attendees</i>            President’s Welcome            Introduction to our adopted charitable organization            Corporate Partner Introductions</p>	<i>Salon A</i>
11:45am-1:30pm	<p><b><u>Lunch and Learn – FSA Federal Update (via webinar)</u></b>            Live Via Webinar the scheduled FSA Federal Update will provide a high-level overview of recent and relevant guidance from the U.S. Department of Education and Federal Loan Servicing concerning the proper administration of the Title IV programs. Learn about general statutory and regulatory changes, operational updates, and reminders schools need to know.</p>	<i>Salon A</i>

1:30pm-1:35pm	<b>Break</b>	
1:35pm-2:25pm	<b>Interest Sessions</b>	
	<p>1. <b><u>Financial Value Transparency (served with a Side of Gainful Employment &amp; Student Disclosures for Dessert) – Panel Style</u></b> <span style="float: right;"><i>Lawrence</i></span></p> <p><i>Moderator: Kim Yoder, Chippewa Valley Technical College</i>  <i>Panelists: Kevin McShane: Vice President of Financial Aid &amp; Compliance, Herzing University</i>  <i>Shane Maloney: Associate Director for Federal Awards, UW Madison</i>  <i>Zong Her: Director of Institutional Research and Data Management, Madison College</i></p> <p>To start off the description on the right foot - THIS APPLIES TO EVERY SCHOOL AND EVERY PROGRAM!! Now that we have that solidified ... Are you fully prepared for Financial Value Transparency? In this session, we will do a high-level overview of the new Financial Value Transparency regulations (all programs), Gainful Employment regulations (some programs), and Student Disclosure requirements (coming in the future for some programs but only sometimes – and often different programs than the other “some programs”). Thoroughly confused? Well that’s why this will only be a high level regulatory overview so that you can also hear directly from your panel of colleagues on what you can do to make sure your institution is prepared for the administrative burden tied to these regulations, how to prepare for the potential outcomes of the reporting, where to find resources to help, and an open Q&amp;A to ask the burning questions you have on these difficult regulations.</p>	
	<p>2. <b><u>Communication Best Practices for Financial Aid Professionals</u></b> <span style="float: right;"><i>Oaktag</i></span></p> <p><i>Moderator: Pam Lowrey, Gateway Technical College</i>  <i>Presenter: Julie Curtis: Senior Financial Aid Counselor, MSOE</i></p> <p>Effective communication lies at the heart of successful financial aid administration. This interactive workshop is designed to equip financial aid professionals with essential skills and best practices to enhance communication in various contexts. Whether interacting with students, parents, or colleagues, this interactive workshop provides practical insights to navigate the complexities of the communication landscape in the financial aid field. Participants will leave the session with a toolkit of communication best practices to elevate their communication skills.</p>	
	<p>3. <b><u>New Student Orientation for Scholarship Winners Welcome to WASFAA and the Financial Aid Profession</u></b> (Session open by invite only for WASFAA New Professional Scholarship Winners) <span style="float: right;"><i>Pippin</i></span></p> <p><i>Presenters: WASFAA Professional Development Committee</i></p> <p>Embarking on a career as a financial aid professional can be both exciting and challenging. Whether you're a recent graduate entering the workforce or transitioning from another field, this session is designed to provide valuable insights and guidance on navigating the intricacies of the financial aid landscape. Hear from other professionals about how they navigated the financial aid profession and developed into experts in financial aid.</p>	
2:25pm-2:45pm	<b>Snack Break with our Corporate Partners</b>	<i>Salon B</i>
2:45pm-3:45pm	<p><b><u>Keynote Session Thriving Minds: Empowering Strategies for Proactive Mental Wellness</u></b> <span style="float: right;"><i>Salon A</i></span></p> <p><i>Brittany Meoska: Professional Certified Coach &amp; Virtual Fitness Instructor, Brittany Meoska Coaching</i></p> <p>Have you ever felt like you are going through the motions in life, almost robotically navigating your way through all of the day-to-day stressors and responsibilities? As the infomercial narrator would say, “There's gotta be a better way!” Join Brittany and discover how to shift out of default mode and work toward higher levels of mental health in this transformative keynote. Take a journey of self-discovery and empowerment as we delve into actionable strategies that redefine how you approach your mental health and overall well-being. In this dynamic session, you will learn proven tools and processes that stretch beyond conventional wisdom, offering a fresh perspective on proactive mental wellness. Immerse yourself in this empowering experience and learn the art of identifying unique and doable actions that will give you a lot of bang for your energetic buck. You will walk away feeling equipped with the knowledge and practical tools to navigate life's complexities with strength, purpose, and a proactive approach to mental wellness (and perhaps the ability to pull off a mean robot arm!).</p>	
3:45pm-4:15pm	<b>Break</b>	

4:15pm-5:00pm

**Interest Sessions**

1. **Hidden Gems: Exploring Practical and Doable Mental Health Tools for Everyday Well-Being**

Lawrence

*Moderator: Matt Lehmann, SoFi*

*Presenter: Brittany Meoska: Professional Certified Coach & Virtual Fitness Instructor*

This insightful session builds upon the concepts shared in the keynote. Let's dive into more often-often overlooked yet highly effective tools that can enhance your mental well-being in everyday life. Discover hidden gems offering actionable insights and empowering processes ready for seamless integration into your daily routine. This session is your guide to fostering resilience, cultivating mental strength, and unlocking the potential of impactful practices for a more fulfilling and purposeful life.

2. **Successful Educational Debt Management: What are the Options?**

Oaktag

*Moderator: Laura Zuege, Lawrence University*

*Presenters: Jennifer Hoepner: Herzing University*

*Terry Micks: Loan Programs Coordinator, UW La Crosse*

In this "course" you will learn about:

- Federal Direct Loan Repayment Plan Options including those that are income based.
- Options to postpone payments.
- Options for other educational debts.
- Loan forgiveness options.
- T-IV Eligibility & Default resolution options including Fresh Start.
- Tips for responsible borrowing, scholarships and repayment.

3. **Succession Planning**

Crown

*Moderator: Heidi Johnson, UW Madison Law School*

*Presenters: Amanda Fijal: Assistant Vice President, Enrollment and Student Advancement; Executive Director of Financial Aid, University of Chicago*

*Mandy Slowinski: Director, Student Financial Support Services, Madison College*

Embark on an exhilarating journey where we unravel the secrets of effective succession planning. Picture this: you have a thriving office, a well-oiled machine. But what happens when a key cog – one of your top leaders – steps down? Chaos? Confusion? Not if you have a solid succession plan in place! In this dynamic presentation we'll explore the ins and outs of identifying the hidden gems within your organization and polishing them into the leaders of tomorrow. Get ready to:

- Discover the innovative strategies for spotting and nurturing talent that's already at your fingertips.
- Participate in interactive discussions on overcoming unique challenges faced when planning for succession in specialized administrative roles.
- Gain insights into the best practices for creating a seamless transition plan that respects the specialized knowledge and skills required in student financial aid and leadership.

This presentation will leave you buzzing with ideas and ready to transform your approach. Say goodbye to leadership gaps and hello to a future of seamless transitions!

4. **PE Time – HIIT CLASS**

Cortland

*Presenter: Jamie Borisch: Financial Aid, Herzing University*

A workout to get your heart rate up! An encore session from 2023!

5:45pm-6:30pm

**Presidents Reception All Are Welcome with Cash Bar**

Salon B

6:30pm-?

**Dinner, WASFAA Awards our New Professional, Years of Service, and Retirees and a super fun night of BINGO!!!!**

Salon A

After dinner WASFAA will present the New Professional, Years of Service and Retiree Recognition Awards. Followed by a super fun night of BINGO where winners will be able to pick a *white elephant gift!* Extra BINGO cards can be purchased in support of our charity!



3. **Intentional to Exceptional Leadership** *Crown*  
*Moderator: Kevin McShane, Herzing University*  
*Presenter: Candi Frasier: Associate Director, WVU*  
 Leading staff in a time of constant change requires intentionality. Today's workplace is filled with multi-generational staff with different strengths and work expectations. This interactive session will provide practical ideas on engaging staff, identifying and capitalizing on their strengths to increase productivity and how your leadership qualities can either hinder or help the workplace.
4. **New Student Orientation- Getting Involved in Our Profession** *Pippin*  
*Presenters: WASFAA Professional Development Committee*  
 Embarking on a career in financial aid can be both exhilarating and overwhelming, especially for newcomers eager to establish connections and navigate the complex landscape of the field. This session is crafted exclusively for new financial aid professionals, offering a roadmap on how to get involved in state, regional, and national associations. By the end of this session, newcomers will have gained practical insights and the confidence to take their first steps into the world of financial aid associations.

11:45am-12:00pm **Break** *Salon B*

12:00pm-1:45pm **Here All, Hear All and Lunch** *Salon A*  
 Get all the latest updates from our colleagues with:  
 Address from the Wisconsin Secretary of State – *Sarah Godlewski*  
 State of Wisconsin Legislative - *JP and Robert Bode*  
 Coalition on Student Debt - *Carole Trone and Cheryl Rapp*  
 College Goal Wisconsin- *Jana Davidowski*  
 HEAB – *Sherry Nelson*  
 WASFAA Presents the Committee of the Year, Special Recognition and Outstanding Service Awards

1:45pm-2:05pm **Break**

2:05pm-4:00pm **NASFAA Credential – Return of Title IV Funds (R2T4)** *McIntosh*  
*Presenters: Julie Curtis: Senior Financial Aid Counselor, MSOE*  
*Katy Weisenburger: Assistant Director of Federal Awards, UW Madison*  
 This session will review how to handle a student's Title IV funds when they withdraw from school before completing the payment period or period of enrollment. You will learn the basic requirements for the return of Title IV funds (R2T4), whether and when to apply the requirements, how to determine the student's withdrawal date, how to calculate the return of funds for each Title IV program, all applicable deadlines, and the rules for making post-withdrawal disbursements. This will help you demonstrate the ability to protect the integrity of the Title IV programs by ensuring your school promptly returns federal funds for which a withdrawn student no longer qualifies. This session will help prepare you to take the credential test. The range of topics in this credential test include General Concepts of R2T4 Funds, Determining Withdrawal Dates, R2T4 Formula, Post-Withdrawal Disbursements, and Time Frames.

2:05pm-3:00pm **Interest Sessions**

1. **Looking for the Needle in a Haystack: Developing, Implementing, and Monitoring a Proactive Compliance Strategy** *Lawrence*  
*Moderator: Dr. Keyimani Alford, Associate VP of Student Access and Success, Madison College*  
*Panelists: Pamela Lowrey, Director of Financial Aid, Gateway Technical College | Kevin McShane, Vice President of Financial Aid and Compliance, Herzing University | Trisha Springstead, Associate Director, Office of Financial Aid Administration, UW– Milwaukee*  
 There is an unwavering stream of regulatory requirements that force Financial Aid Offices to constantly adjust their operations and policies. How do you stay abreast of these changes? What are the financial risks to your institution when compliance is not maintained? How do you avoid being on the Top 10 audit findings list? Attend this panel discussion to learn how leaders within the financial aid industry approach compliance, share proven tools and frameworks, and communicate strategy to maintain administrative capability for their institutions.

2. **Professional Development 101: Financial Aid Administrator as a Profession** *Oaktag*  
*Moderator: Deb Gossman, College Ave*  
*Presenter: Susan Johnson: Financial Aid Director, UW Stevens Point*  
 Are you a fledgling Financial Aid Administrator? Or have you been in the game longer than you care to remember? Either way, you make our profession possible. This presentation focuses on getting people through the door, keeping them here, nurturing their skills, and advancing the profession as a whole. Students are why we are here and why we do what we do, but hard-working professionals are the cornerstone of how we do it. Especially, during the turbulent times we find ourselves in. Whether you are new to the financial aid scene or a seasoned Financial Aid Administrator, we hope you'll find something to take away from this session.
3. **How to Build Your Customer Service Best Practices** *Crown*  
*Moderator: Robert Bode, Director, UW River Falls*  
*Panelists: Members of the UW-Madison OSFA Student Service & Communications Collaborative Community: Erica Robinson, Federal Awards Coordinator | Karla Weber Wandel, Communications Manager | Pa Houa Xiong, Asst Director for Advising & Outreach |Maggie Zabinski, Verification Specialist*  
 UW-Madison's Financial Aid Office recently established "Collaborative Communities" to tackle some shared goals and projects across teams in the office. One of these groups, "Student Service and Communication," first tasked itself with gathering our different understandings around Customer Service and built a simple, shared philosophy for their whole crew to lean on. Learn about their process and how you can do the same in your office.
4. **SAP as a Retention Tool** *Pippin*  
*Moderator: Ben Wilkes, UW Oshkosh*  
*Presenter: Tom Uecker: Financial Aid Officer, UW-Whitewater*  
 This session will explain how your campus based Satisfactory Academic Progress Policy can be utilized to retain students at your institution through effective communication, utilizing campus-based resources, and consistency throughout the appeals process.

3:00pm-3:15pm **Soda and Snack Break** *Salon B*

3:15pm-4:00pm **Interest Sessions**

1. **Money Back Guarantee; Fraud Panelist Discussion** *Lawrence*  
*Moderator: Kim Pick: Financial Aid Coordinator, CVTC*  
*Panelists: Betsy Henkel: Director of Financial Aid, Beloit College*  
*Deb Gossman: Head of Campus Development, College Ave*  
*Kim Yoder: Director of Financial Aid, Chippewa Valley Technical College*  
 Every school has experienced some type of fraud. As discussed at the NASFAA National Convention this past summer, "If you don't think you have fraud, you are wrong." In this foundational session, we will identify what fraud is, what various institutions are encountering, and how to handle it. When planned and managed, brainstorming can lead to many high-quality ideas about possible fraud and how to respond. Hear from a panel comprised of a private lender and three financial aid administrators as they share their experiences with combatting fraud. There will be time to ask questions and share your experiences as well.
2. **Unlocking Futures through the Second Chance Pell Program** *Oaktag*  
*Moderator: Jenny Chandler, Sallie Mae*  
*Presenters: Triena Bodart: Manager, Moraine Park Technical College*  
*Mia Greene: Financial Aid Coordinator, Madison Area Technical College*  
*Beth Serwe: Financial Aid Specialist, Moraine Park Technical College*  
 Interested in exploring the world of Pell Education Programs and the work it takes to make it successful? Join us for a discussion of the regulations and work involved in creating your own program. Hear about our own experience and visits with Prisoners in our Care (PIOCs).

3. **Atomic Habits** *Crown*  
*Moderator: Katie Mueller, Colleging*  
*Presenter: Christina Rose: VP Relationship Manager, Citizens Bank*  
 Learn to break bad behaviors and create better ones by understanding the 4 laws to create positive changes in your everyday life. Attendees will learn that improving 1% everyday will make you 37% better in one year.
4. **DEI on a Budget: How to learn and grow with a small team.** *Pippin*  
*Moderator: Lisa Valentine, ScholarNet*  
*Presenters: Pade Thao, Federal Awards Administrator, UW Madison*  
*Maggie Zabinski, Verification Specialist, UW Madison*  
 DEI work can build a strong team and transform them for the better. Join teammates from the University of Wisconsin-Madison to learn about how their small team started a low budget DEI journey. This session will help attendees gain confidence in creating an inclusive and trusting environment. Attendees will learn strategies to expand relationships and build trust on a small team. After this session, attendees will be able to incorporate low-cost DEI activities and discussions on their teams.

4:00pm-4:10pm	<b>Break</b>	
4:10pm-5:00pm	<b><u>Sector Meetings</u></b> Wisconsin Technical College System Private (WAICU) Universities of Wisconsin Career/Proprietary Tribal Associate	<i>Crown</i> <i>Oaktag</i> <i>Lawrence</i> <i>Pippin</i> <i>McIntosh</i> <i>Blaze</i>
5:00pm-5:45pm	<b>WASFAA Study Hall</b>	<i>Clubhouse</i>
6:00pm-8:00pm	<b>WASFAA “RA” Led Group Dinners</b> Dinners out on the town in Appleton led by an “RA” See <a href="#">group sign-ups</a> to gather with your colleagues!	<i>Out on the Town</i>

---

***FRIDAY, April 12<sup>th</sup>***

6:30am-7:15am	<b>Early Morning Walkers</b>	<i>Meet in Hotel Lobby</i>
8:00am-8:45am	<b>Breakfast Buffet</b>	<i>Salon A</i>
8:45am-9:45am	<b><u>Hot Topics FAFSA Simplification and What’s Coming</u></b> <i>Moderator: Casey Lehmann, Financial Aid Manager, Nicolet Area Technical College</i> <i>Panelists: Robert Bode, Director, UW- River Falls   Jamie Borisch; Assistant Director, Herzing University   Amanda Fijal; Assistant Vice President, Enrollment and Student Advancement; Executive Director of Financial Aid, University of Chicago   Ryan Gebler, Financial Aid Director, Lawrence University   Kim Yoder, Financial Aid Director, CVTC</i> This is your chance to discuss the current Financial Aid Hot Topics with your colleagues. Topics to be discussed include FAFSA Simplification and the rollout of the 24-25 application; Financial Value Transparency (FVT) and Gainful Employment (GE); Hiring Work Study Employees; Staff turnover; etc.	<i>Salon A</i>
9:45am-10:00am	<b>Stretch Break</b>	
10:00am-11:00am	<b><u>Business Meeting/Passing of the Gavel</u></b> Charity Fundraising Presentation Update from the Professional Development Committee WASFAA Presents The 2023 President Award Business Meeting/Passing of the Gavel	<i>Salon A</i>

**THANK YOU**  
**2024 Corporate Partner Exhibitors**

Ascendium Education Solutions - [Debbie Murphy](#)

Citizens One – [Christina Rose](#)

College Ave – [Deb Gossman](#)

College Raptor – [Jeff Pierpont](#)

Colleging – [Katie Mueller](#)

Earnest – [Kevin McNamara](#)

ELM – [Raina Chezem](#)

Inceptia – [Mike Lubben](#) & [Tim O’Donnell](#)

ISL Education Lending – [Jane Lemke](#)

Monogram – [Lisa Albers](#)

PNC – [Kim Jenkins](#)

Sallie Mae – [Jenny Chandler](#)

ScholarNet – [Lisa Valentine](#)

SoFi – [Matt Lehmann](#)

Summit Credit Union – [Penny Armagost](#)

**SAVE THE DATES:**

*NASFAA National Conference: June 16-19, 2024, in Milwaukee Wisconsin*

*MASFAA Conference: October 7-10, 2024, in Columbus, Ohio*

*WASFAA 2025 Conference: March 26-28 2025, in Green Bay, Wisconsin*



# Campus Map

